

# Cosmetics Store Management

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# Abstract

This project presents a comprehensive Cosmetics Store Management system designed to streamline operations, enhance customer experience, and optimize inventory management within the cosmetics retail sector. The system integrates various functionalities, including product management, sales tracking, customer relationship management, and reporting features.

The objective of this project is to develop an efficient platform that enables store owners to manage their inventory effectively, track sales trends, and maintain customer records seamlessly. By implementing a user-friendly interface, the system aims to facilitate easy navigation for both staff and customers, ultimately improving service quality and operational efficiency.

Through this project, we also highlight the importance of data analytics in the cosmetics industry, providing insights that can drive marketing strategies and improve customer satisfaction. Overall, the Cosmetics Store Management system serves as a vital tool for retailers seeking to thrive in a competitive market while ensuring an enhanced shopping experience for their customers.

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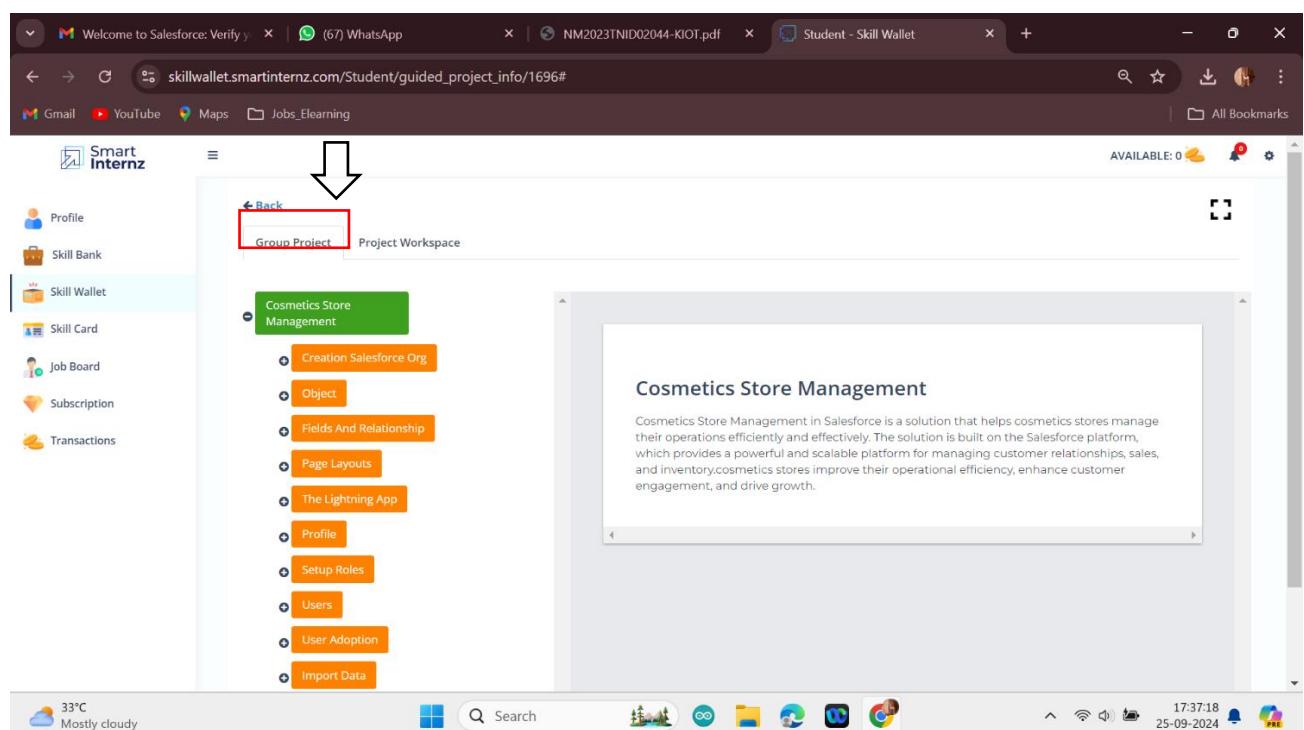
# 1.Creation Salesforce Org

## 1.1.Logging into SmartInternz Skill Wallet:

1. **Visit**
2. **The SmartInternz website:** Go to [SmartInternz](#).
3. **Locate the Login Option:** On the homepage, find the login or sign-in option.
4. **Use your credentials:** Enter the email and password you registered with. If you're using a platform-linked account (e.g., Google, LinkedIn), use the corresponding option to sign in.
5. **Navigate to the Skill Wallet:** After logging in, go to your dashboard or profile section where you should find "Skill Wallet" or "Guided Projects" listed.

## 1.2.Accessing Guided Projects:

1. After logging in, navigate to the "Guided Projects" tab or section on the SmartInternz platform.
2. Here, you should be able to see any projects you've been assigned or those you've enrolled in.
3. Click on any project to view the details, guidelines, and resources you need to complete it.



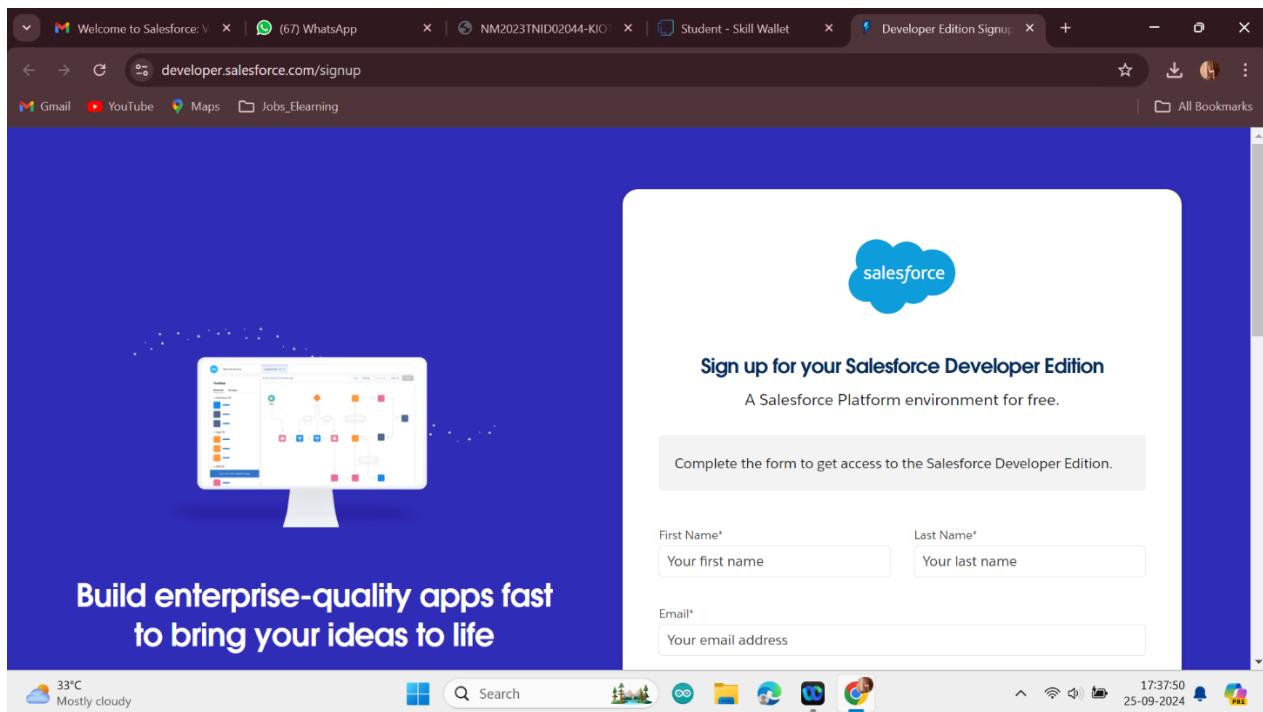
### 1.3.Creating Developer Account

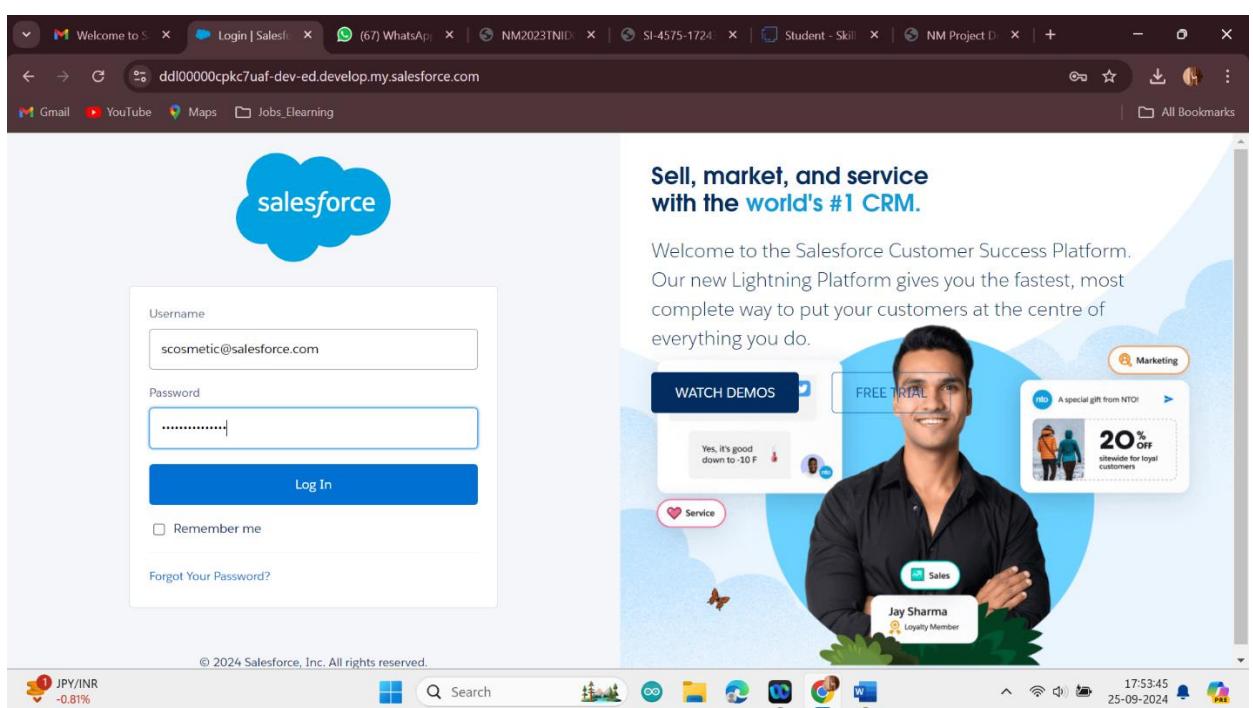
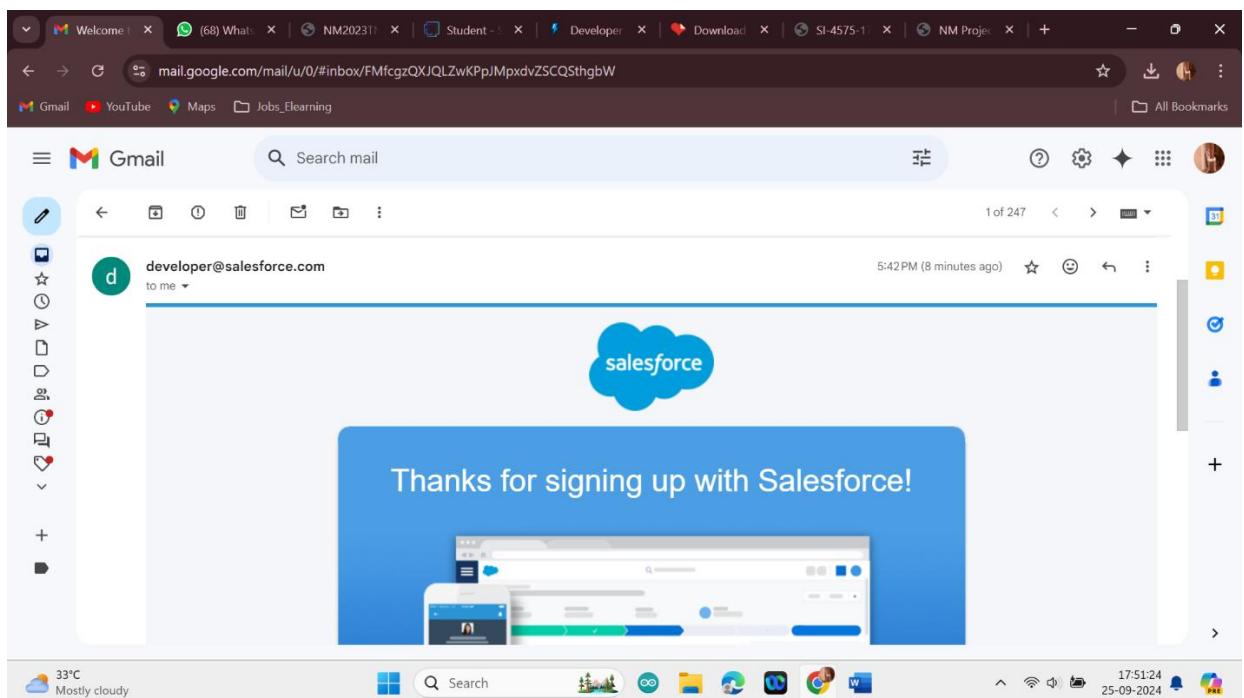
Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/signup](https://developers.salesforce.com/signup).
2. Click on sign up.
3. On the sign up form, enter the following details :
  - a. First name & Last name
  - b. Email
  - c. Role : Developer
  - d. Company : College Name
  - e. County : India
  - f. Postal Code : pin code
  - g. Username : should be a combination of your name and company.

This need not be an actual email id, you can give anything in the format  
[:username@organization.com](mailto:username@organization.com)

Click on sign up after filling these.





## 2.Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Custom objects :Our Customers, Consultants, Retailers, Others.

### **2.1.To Create an object:**

To Create an object:

Creation of Objects for Urban Color, For this Urban Color we need to create 3 objects

i.e .,Our Customers, Consultants, Retailers, others.

The below steps will assist you in creating those objects.

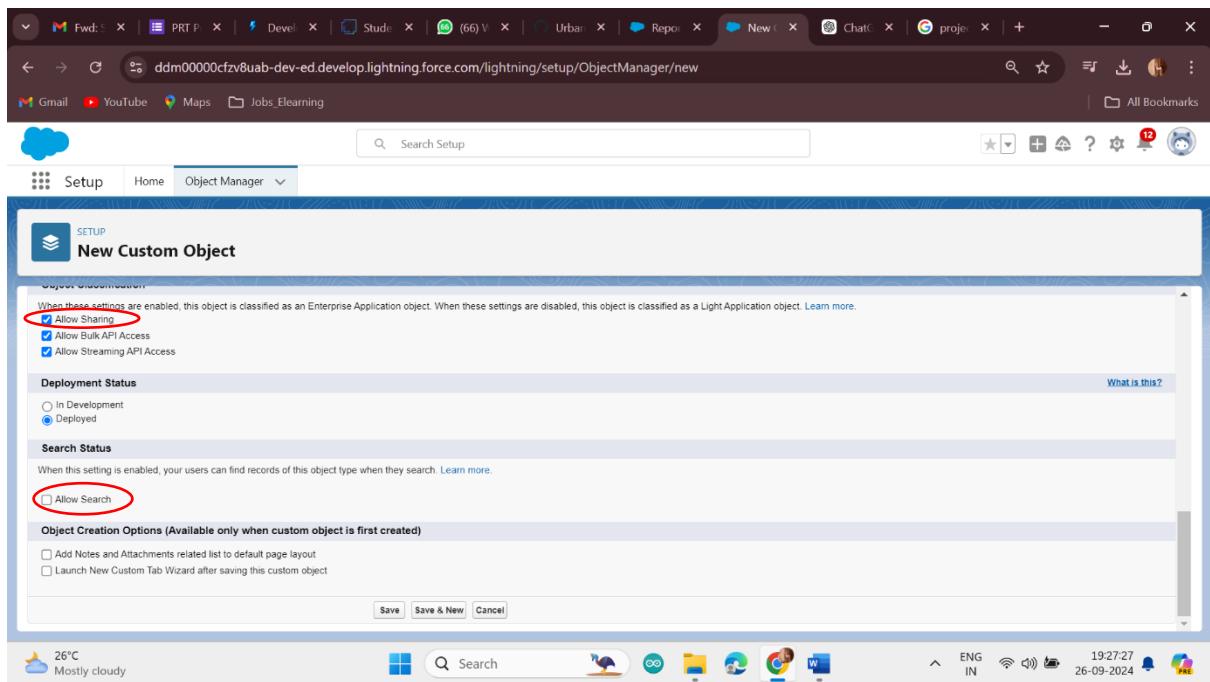
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Our Customer Object

On the Custom Object Definition page, create the object as follows:

- Label: Our Customer
- Plural Label: Our Customers
- Record Name: Our Customer
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Our Customer.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

Screenshot of the Salesforce Object Manager page. The URL is [ddm00000cfv8uab-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home](https://ddm00000cfv8uab-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home). The page shows a list of standard objects under the 'Object Manager' tab. The 'Custom Object' button in the top right is highlighted with a red box and a black arrow pointing to it.

Screenshot of the 'New Custom Object' creation page. The URL is [ddm00000cfv8uab-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new](https://ddm00000cfv8uab-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new). The page displays the 'Custom Object Definition Edit' form. The 'Label' field in the 'Custom Object Information' section is highlighted with a red box and a black arrow pointing to the 'Object Name' field below it.



## 2.2. Consultants Object Creation

### To Create an object:

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Consultant Object

On the Custom Object Definition page, create the object as follows:

- Label: Consultant
- Plural Label: Consultants
- Record Name: Consultants
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Consultants.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

### **2.3.Retailers object creation**

To Create an object:

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Retailer Object

On the Custom Object Definition page, create the object as follows:

- Label: Retailer
- Plural Label: Retailers
- Record Name: Retailers
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Retailers.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

### **2.4.Others Object Creation**

To Create an object:

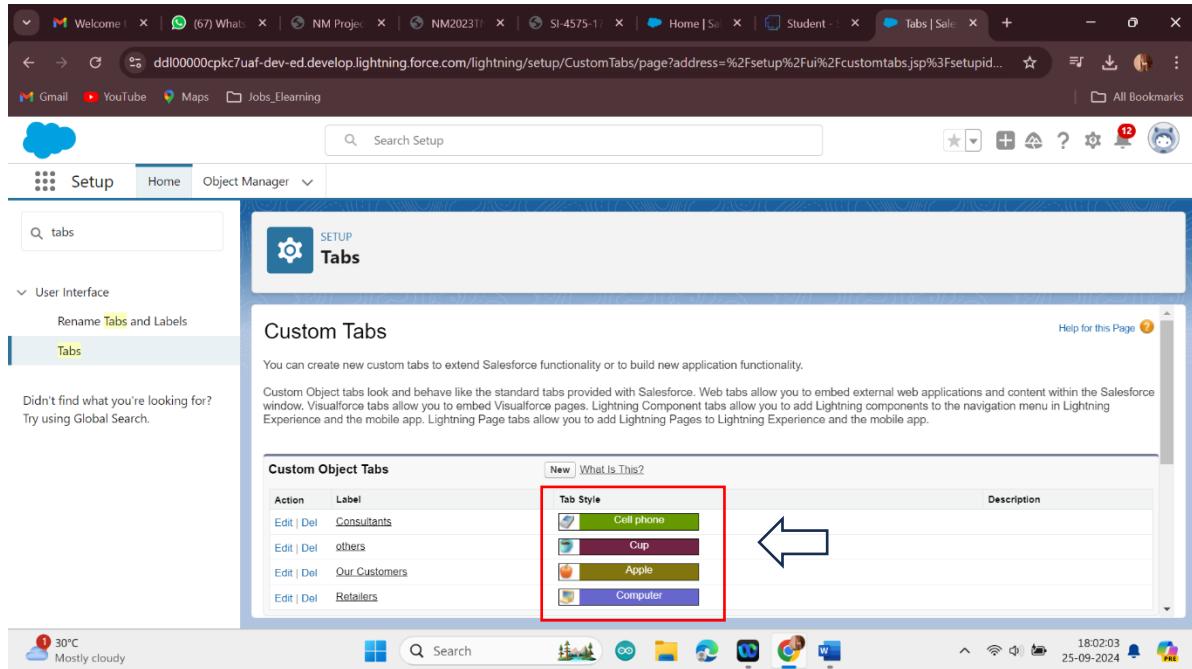
The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of others Object

On the Custom Object Definition page, create the object as follows:

- Label: other
- Plural Label: others
- Record Name: others
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select others.

- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. The main content area displays the 'Custom Tabs' page. On the left, there's a sidebar with 'User Interface' sections like 'Rename Tabs and Labels' and 'Tabs'. The main content area has a heading 'Custom Tabs' and a sub-section 'Custom Object Tabs'. A table lists custom tabs with actions 'Edit | Del' and labels 'Consultants', 'others', 'Our Customers', and 'Retailers'. Below this table, a section titled 'Tab Style' contains four items: 'Cell phone' (green), 'Cup' (purple), 'Apple' (yellow), and 'Computer' (blue). An arrow points from the text 'Select any icon.' to the 'Cell phone' item. The status bar at the bottom shows weather (30°C, mostly cloudy), a search bar, and system information (18:02:03, 25-09-2024).

Action	Label	Tab Style	Description
Edit   Del	Consultants	Cell phone	
Edit   Del	others	Cup	
Edit   Del	Our Customers	Apple	
Edit   Del	Retailers	Computer	

### 3.Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

#### **3.1.Fields in Our Customers objects**

Fields in Our Customers objects follow below data types:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Address	Text Area
6	Additional Information	Text Area

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs like Setup, Home, and Object Manager. Below it, a sidebar lists various setup options: Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Our Customer' and shows the 'Fields & Relationships' section. It lists 10 items, sorted by Field Label. The fields include Customer Name, Email id, Last Modified By, Mobile Number, Our Customer (a self-referencing relationship), and Owner. Each field has a label, name, and data type. A red circle highlights the 'Our Customer' relationship field, and a blue arrow points from the text 'Relationships are created by creating custom relationship fields on an object.' to this highlighted field.

### 3.2.Fields in Consultants objects

Fields in Consultants objects follow below data types:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick	
	2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer details	Lookup(Our Customers Object)
9	Address	Text Long

The screenshot shows the Salesforce Setup interface with the following details:

- URL:** dd100000cpkc7ufa-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000002cvQj/FieldsAndRelationships/view
- Header:** Shows various browser tabs and the Salesforce logo.
- Top Bar:** Includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'.
- Breadcrumb:** 'SETUP > OBJECT MANAGER' followed by 'Consultant' (highlighted with a red circle and a blue arrow pointing from the previous section).
- Left Sidebar:** 'Fields & Relationships' section with links to 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', and 'Record Types'.
- Table:** 'Fields & Relationships' table showing 13 items:
 

Field Label	API Name	Type
Customer Details	Customer_Details__c	Lookup(Our Customer)
Customer id	Customer_id__c	Auto Number
Customer Name	Customer_Name__c	Text(15)
Delivery Type	Delivery_Type__c	Picklist
Email id	Email_Id__c	Email
Last Modified Date	Last_Modified_Dt	Lookup(User)
Last Modified By	Last_Modified_By	Lookup(User)
- Bottom:** System status bar showing 'Humid Now', system icons, and the date/time '18:13:54 25-09-2024'.

### 3.3.Fields in Retailers objects

Fields in Retailers objects follow below data types:

S No	Field Label	Data Type
1	Customer id	Auto Number
2	Customer Name	Text
3	Mobile Number	Phone
4	Email id	Email
5	Delivery Type 1)Self Pickup 2)Courier	Picklist
6	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm	Multi-Picklist

	6)Nail Polish	
7	Payment 1)Debit Card 2)Credit Card 3)UPI 4)Cash	Picklist
8	Customer Details	Master-Detail Relationship (Our Customers Object)

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is `ddl00000cpkc7uaf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000002cupk/FieldsAndRelationships/view`. The page title is "Fields & Relationships" for the "Retailer" object. The left sidebar shows tabs for "Details", "Fields & Relationships" (which is selected), and other options like "Page Layouts", "Lightning Record Pages", etc. The main content area displays various fields with their labels, field names, and data types. A red circle highlights the "Retailer" label in the breadcrumb navigation bar, and a white arrow points from it to the "Retailer" label in the main content area.

### 3.4.Fields in Others objects

Fields in Others objects follow below data types:

S No	Field Label	Data Type
1	Name	Text
2	Employee 1)Company Employee 2)Staff 3)Special Reference	Picklist
3	Coupon	Text
4	Products 1)Lipstick 2)Compact 3)EyeLiner 4)FacePack 5)Lip Balm 6)Nail Polish	Multi-Picklist

The screenshot shows the Salesforce Object Manager interface. A red circle highlights the 'other' object icon in the top navigation bar. An arrow points from this highlighted area to the 'other' object entry in the main list. The main list displays various fields and relationships for the 'other' object, including Employee, Last Modified By, Name, others, Owner, and Products.

Field Label	Type
Employee	Picklist
Last Modified By	Lookup(User)
Name	Text(24)
others	Name
Owner	Lookup(User,Group)
Products	Picklist (Multi-Select)

## 4.Page Layouts

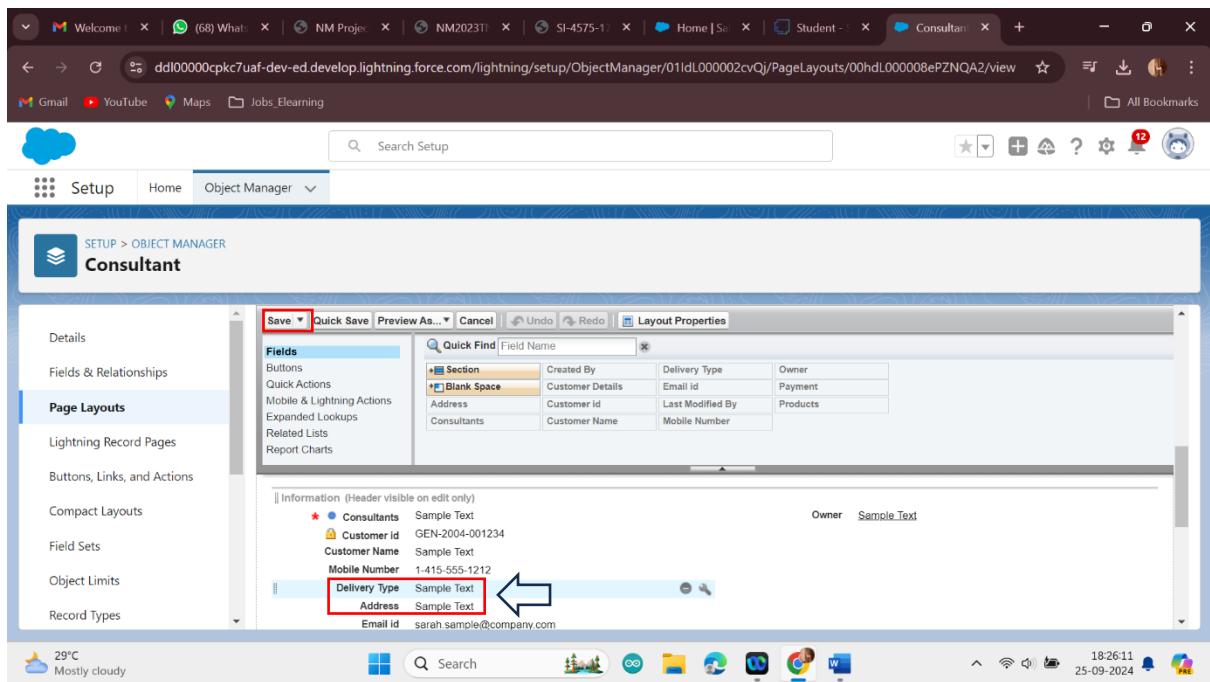
In Salesforce, page layouts define the organisation and arrangement of fields, buttons, related lists, and other components on an object's detail and edit pages. They allow you to control the user interface and tailor it to meet the specific needs of your organisation.

### **4.1.Page Layout Creation**

1. From the Salesforce setup menu, go to "Object Manager" and select the Consultants object.
2. Click on "Page Layouts" in the left sidebar. This will display a list of available page layouts for the selected object.
3. Select the Consultant Layout page layout

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Welcome, WhatsApp, NM Project, NM2023I, SI-4575-1, Home, Student, Consultant, and various system icons. Below the bar, the URL is dd100000cpkc7uaf-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id000002cvQj/PageLayouts/view. The main header says "SETUP > OBJECT MANAGER Consultant". On the left, a sidebar menu is open with "Page Layouts" highlighted. The main content area displays a table titled "Page Layouts" with one item: "Consultant Layout" created by Tapasi Likitha Reddy on 25/09/2024 at 5:58 pm, last modified by the same user on 25/09/2024 at 6:13 pm. The bottom of the screen shows the Windows taskbar with various pinned icons and system status indicators.

4. Click And Drag Delivery type and Address Fields Below Phone field.
5. Click on Save.



## 5.The Lightning App

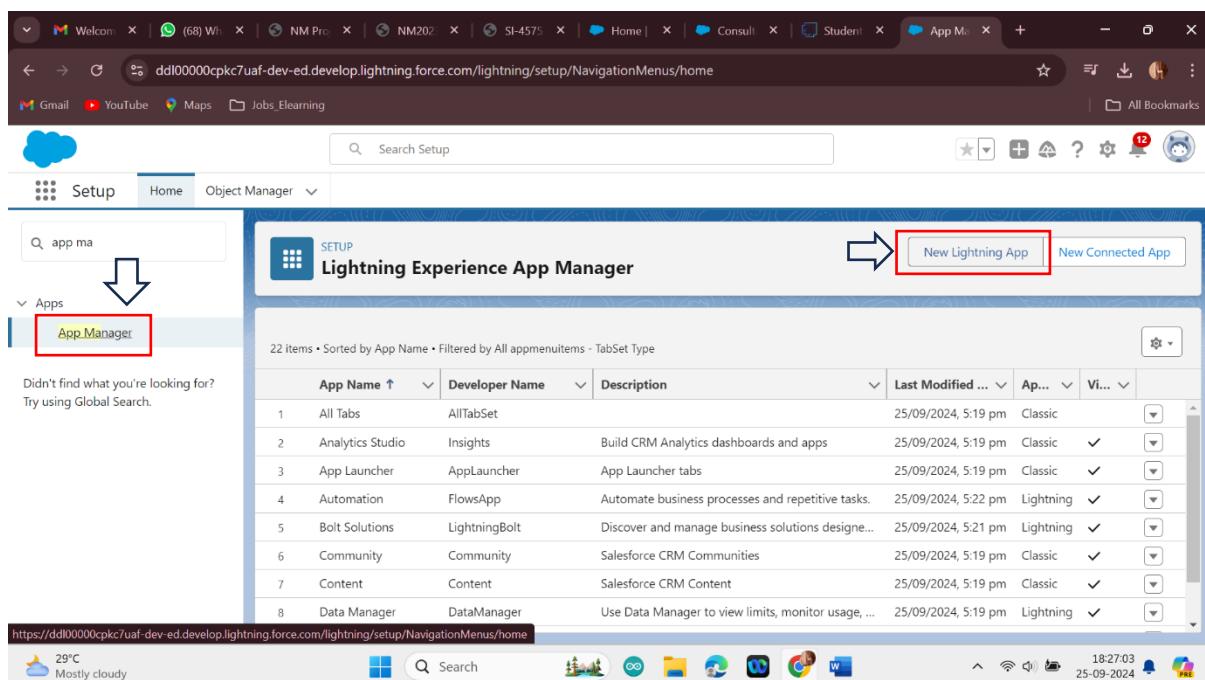
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom Color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

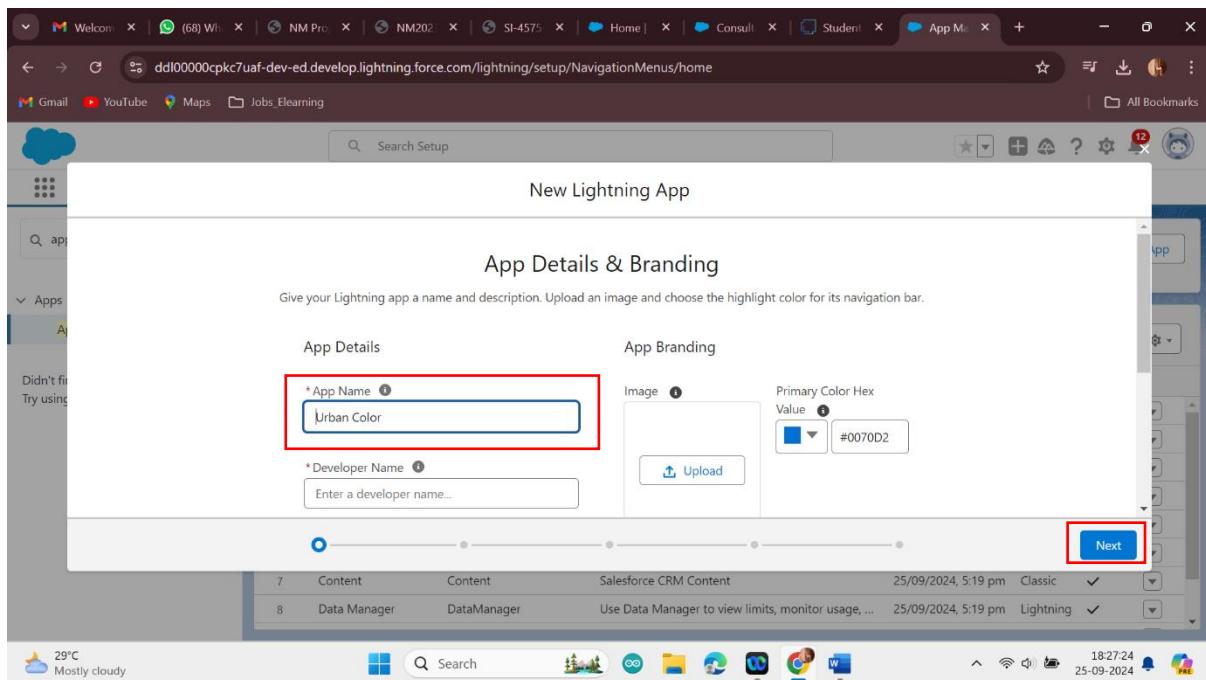
### **5.1.Create a Lightning App**

To create a lightning app page:

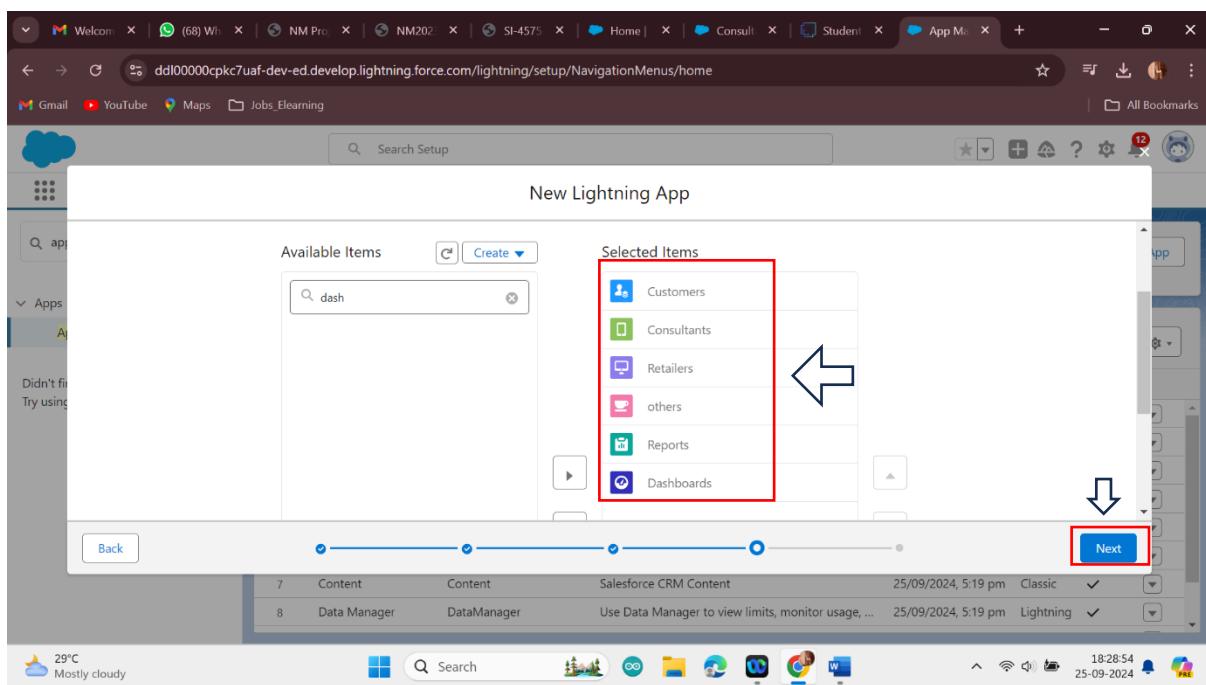
1. Go to setup page --> search “app manager” in quick find --> select “app manager” --> click on New lightning App.



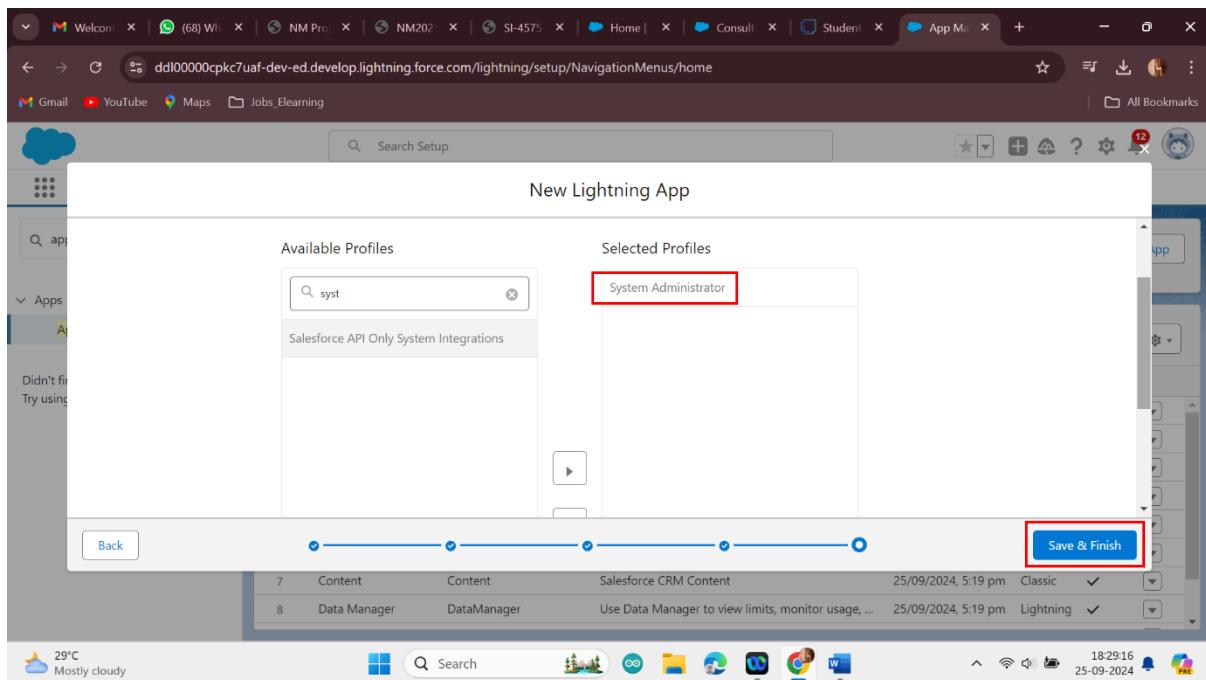
2. Fill the app name as Urban Color in app details and branding --> Next --> (App option page) keep it as default --> Next --> (Utility Items) keep it as default --> Next.



3. To Add Navigation Items.
4. Select the items (Our Customers, Consultants, Retailers, Others, Reports, Dashboards ) from the search bar and move it using the arrow button --> Next.
5. To Add User Profiles:



6. Search profiles (System administrator) in the search bar --> click on the arrow button-> save & finish.



## 6.Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

### 6.1.Creating a Profiles

Creating a Profiles: Now create a Store Supervisor profile and set its object permissions.

Creating a Profiles:

Now create a Store Supervisor profile and set its object permissions.

- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Store Supervisor.
- Click Save.
- While still on the Store Supervisor profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read>Edit,Delete,View all and modify all for Our Customers,Consultants,Retailers,Others.
- Scroll down to Custom App Settings and give access for Urban Color.

To create a new profile:

1. Go to setup --> type profiles in quick find box --> click on profiles --> clone the desired profile (standard user is preferable) --> enter profile name --> save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The 'Profiles' tab is selected in the top navigation bar. On the left, there's a search bar with 'profiles' typed in and a sidebar with 'Users' and 'Profiles' sections. The main area displays a table of profiles. A red box highlights the 'Standard User' row, and an arrow points from the text 'Clone the desired profile (standard user is preferable)' to this row. The table columns include 'Action', 'Profile Name', 'User License', and 'Custom'. Other profiles listed include 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'System Administrator'.

2. Scroll down to the Custom object permission and give all access to the Consultants, Others, Our Customers, Retailers object.

The screenshot shows the Salesforce Setup - Profiles page. In the 'Data Administration' section, the 'Consultants' and 'Retailers' rows are highlighted with a red box. An arrow points to the 'Consultants' row. The 'Others' row also has checked boxes in the 'View All' and 'Modify All' columns. The 'Our Customers' row has checked boxes in the 'View All' and 'Modify All' columns. The 'Session Settings' and 'Password Policies' sections are also visible.

3. Click on Save.
4. Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Billing Operator.

The screenshot shows the Salesforce Setup - Profile page for 'Billing Operator'. The 'Name' field is highlighted with a red box. The 'Profile Detail' section shows the profile is a 'Custom Profile'. The 'Page Layouts' section is visible at the bottom.

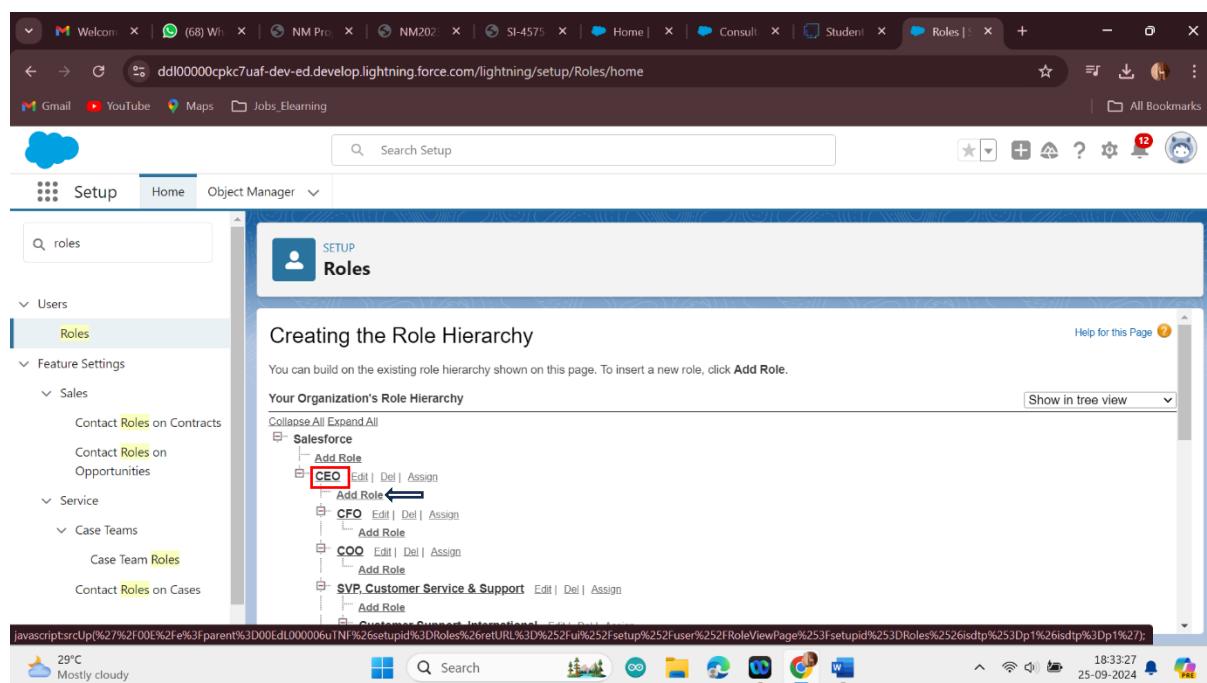
## 7. Setup Roles

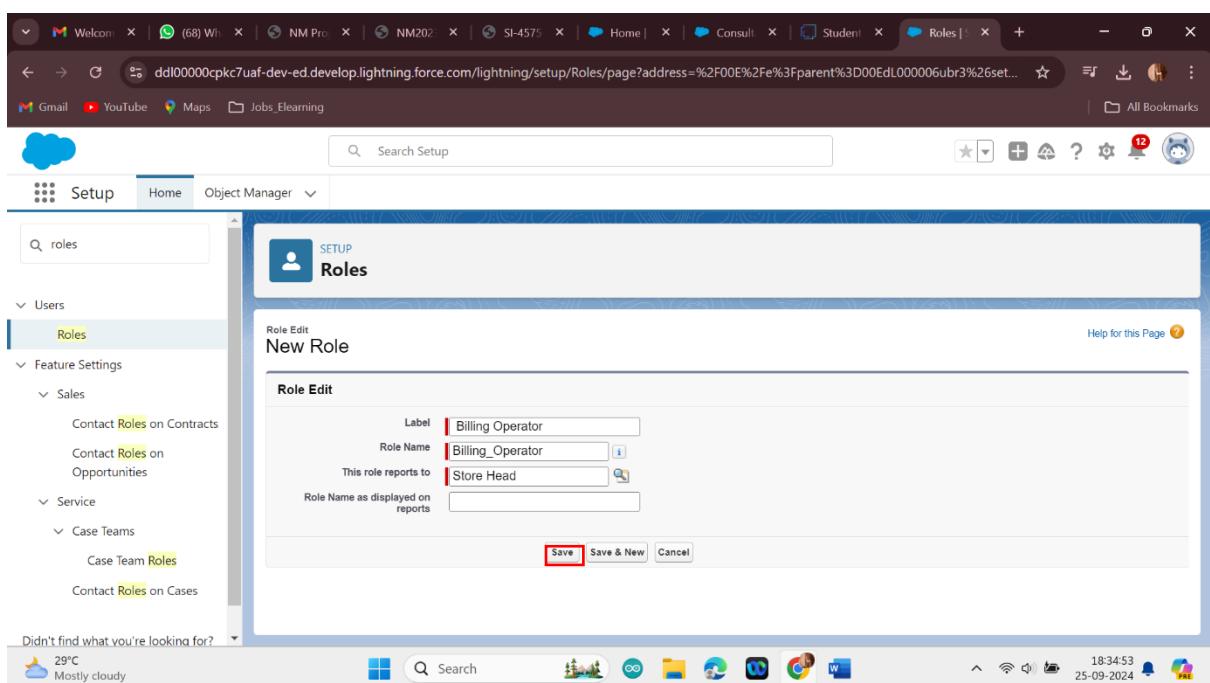
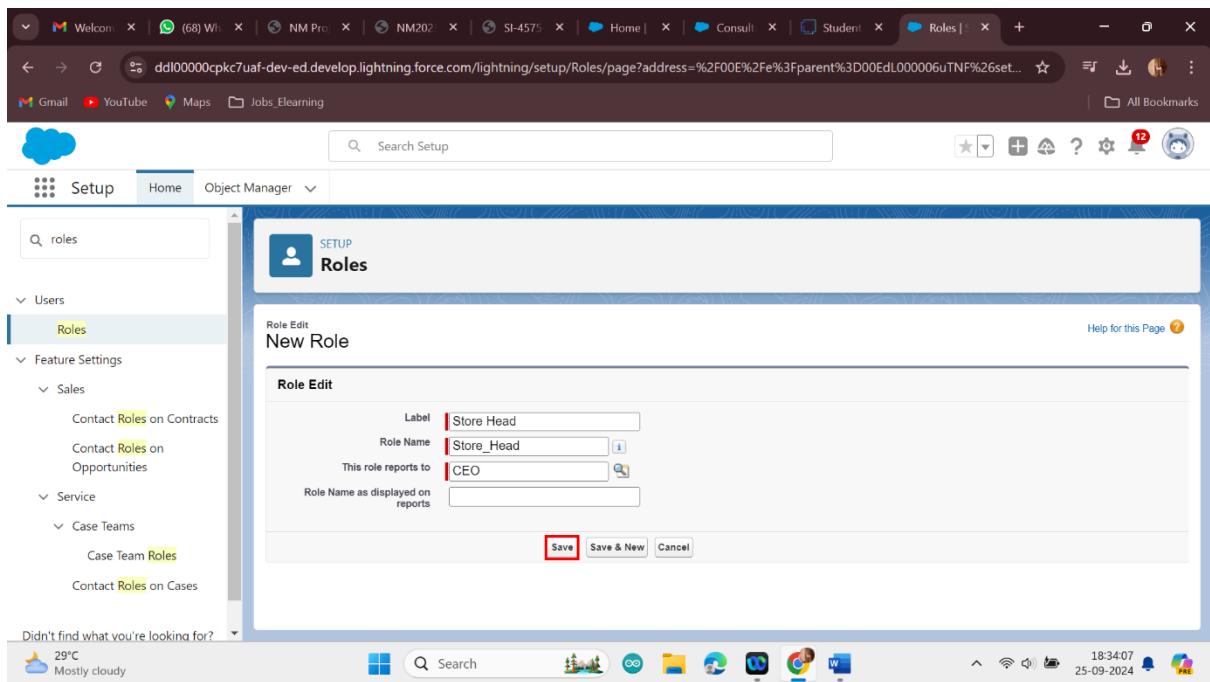
Roles are record-level access controls that define what data a user can see in Salesforce.

### 7.1. Setup Roles

1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Store Head, Role Name Store\_Head.
9. Enter a Role name that will be displayed on Reports
10. Click on Save .

Similarly create One Roles under Store Head as Billing Operator.





The screenshot shows the Salesforce Setup Roles page. The left sidebar has a search bar and navigation links for Users, Feature Settings, Sales, Service, and Case Teams. The main area displays the 'Your Organization's Role Hierarchy' with the following structure:

- Salesforce
  - Add Role
  - CEO** Edit | Del | Assign
  - CFO** Edit | Del | Assign
  - COO** Edit | Del | Assign
  - Store Head** Edit | Del | Assign
    - Billing Operator** Edit | Del | Assign
  - SVP Customer Service & Support** Edit | Del | Assign

A red box highlights the 'Billing Operator' role under 'Store Head'. A blue arrow points from the text 'Billing Operator' in the question to this highlighted role in the screenshot.

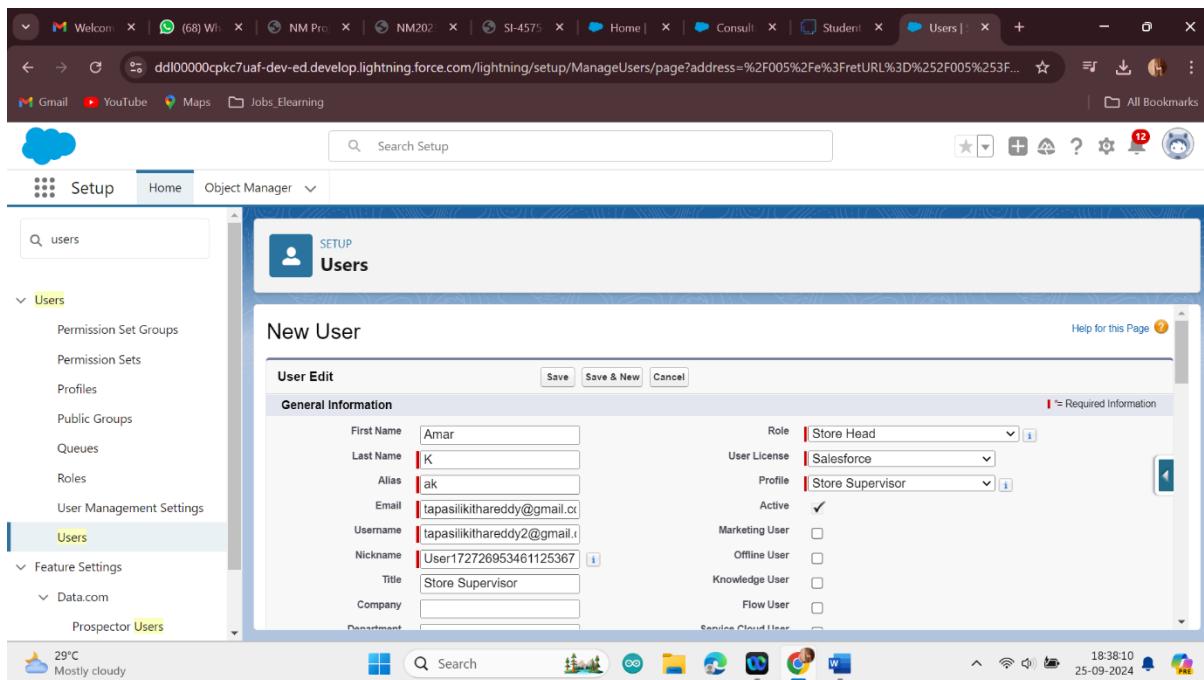
## 8.Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

### **8.1.Creating a Users:**

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name Amar K and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Store Head)
5. Select a User Licence As Salesforce.
6. Select a profile as Store Supervisor.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.



### **8.2.Second User Creation**

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.

3. Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a Role(Billing Operator)
5. Select a User Licence As Salesforce Platform.
6. Select a profile as Billing Operator.
7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.  
Fill in the fields (first name, last name, alias, email id, username, nick name, role, user licence, profiles) --> save.

## 9.User Adoption

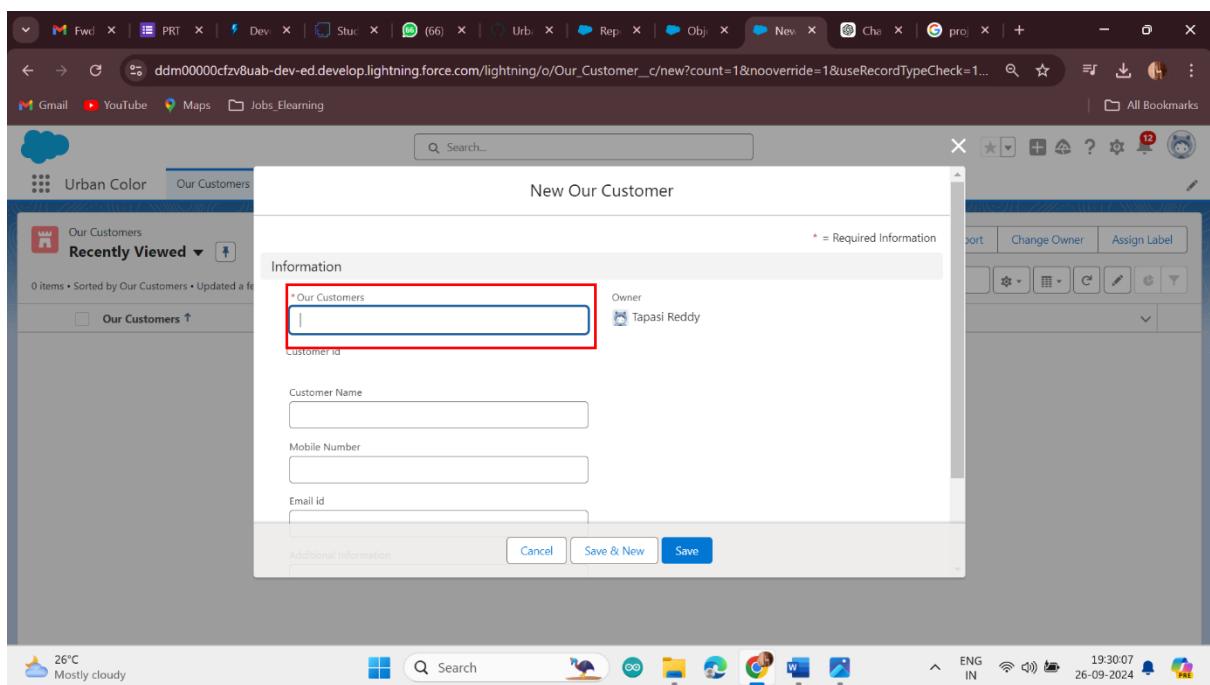
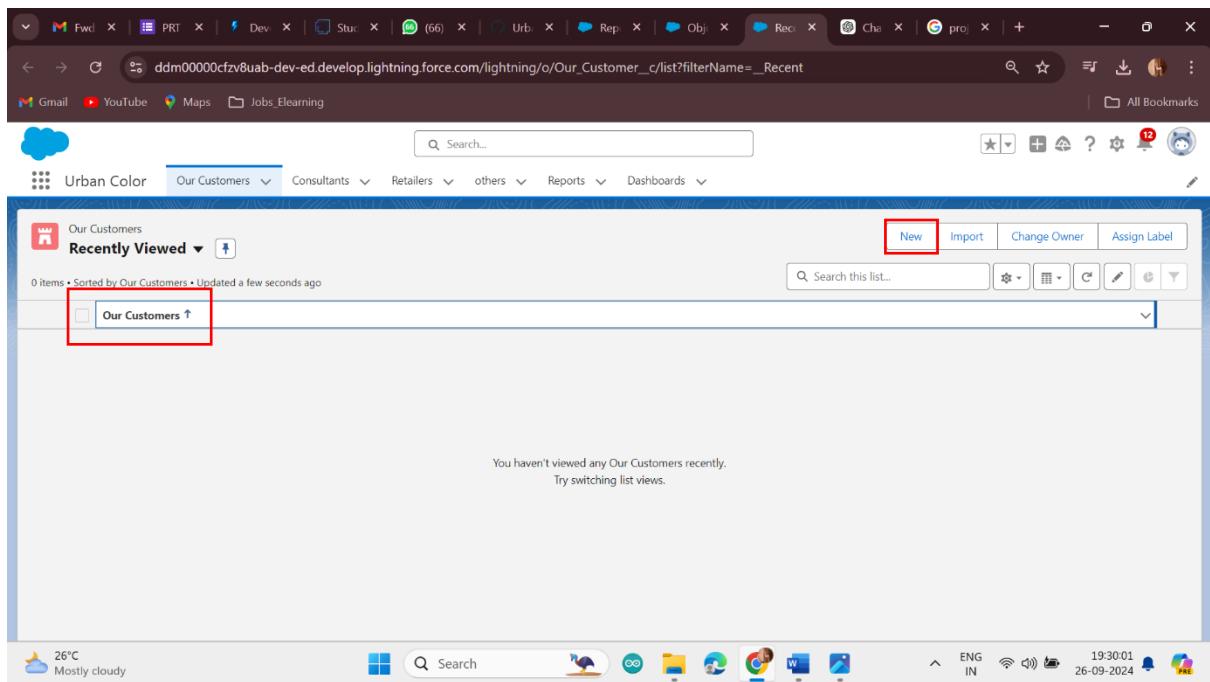
We need to understand user adoption and navigation. How to interact with database and their records.

### 9.1.Create Our Customer Record

1. Click on App Launcher on left side of screen.
2. Search Urban Color & click on it.
3. Click on Our Customer tab.
4. Click new button
5. Fill all Our Customer record details.
6. Click on Save Button

The screenshot shows the Salesforce Setup interface. In the top-left corner of the main content area, there is a search bar with the placeholder "Search Setup". Below it, a table lists users with columns for Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for Chatter Expert, K. Amar, Likitha Reddy\_Tanasi, Teddy\_John, User\_Integration, and User\_Security. A red box highlights the "Urban Color" entry in the App Launcher search results on the left sidebar, which also lists other apps like "Chatter", "Lightning Experience Transition Assistant", and "Salesforce Mobile App".

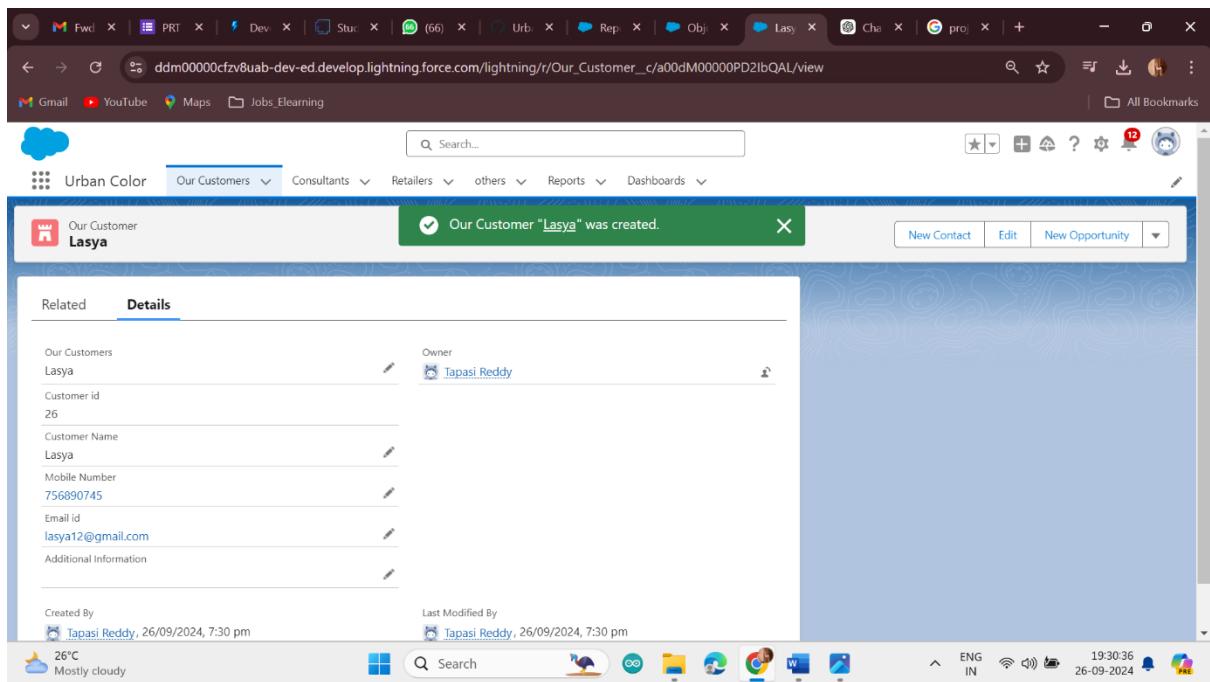
Full Name	Alias	Username	Role	Active	Profile
Chatter Expert	Chatter	chatty.00dd00000cpkc7uaf_gs6wh7sgwt@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
K. Amar	ak	taosilkithareddy2@gmail.com	Store Head	<input checked="" type="checkbox"/>	Store Supervisor
Likitha Reddy_Tanasi	Tliki	scosmetic@salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Teddy_John	jtedd	taosilkithareddy27@gmail.com	Billing Operator	<input checked="" type="checkbox"/>	Billing Operator
User_Integration	integ	integration@00dd00000cpkc7uaf.com		<input checked="" type="checkbox"/>	Analytics_Cloud Integration User
User_Security	sec	insightsecurity@00dd00000cpkc7uaf.com		<input checked="" type="checkbox"/>	Analytics_Cloud Security User



## 9.2. View Record (Our Customer)

View Record (Our Customer):

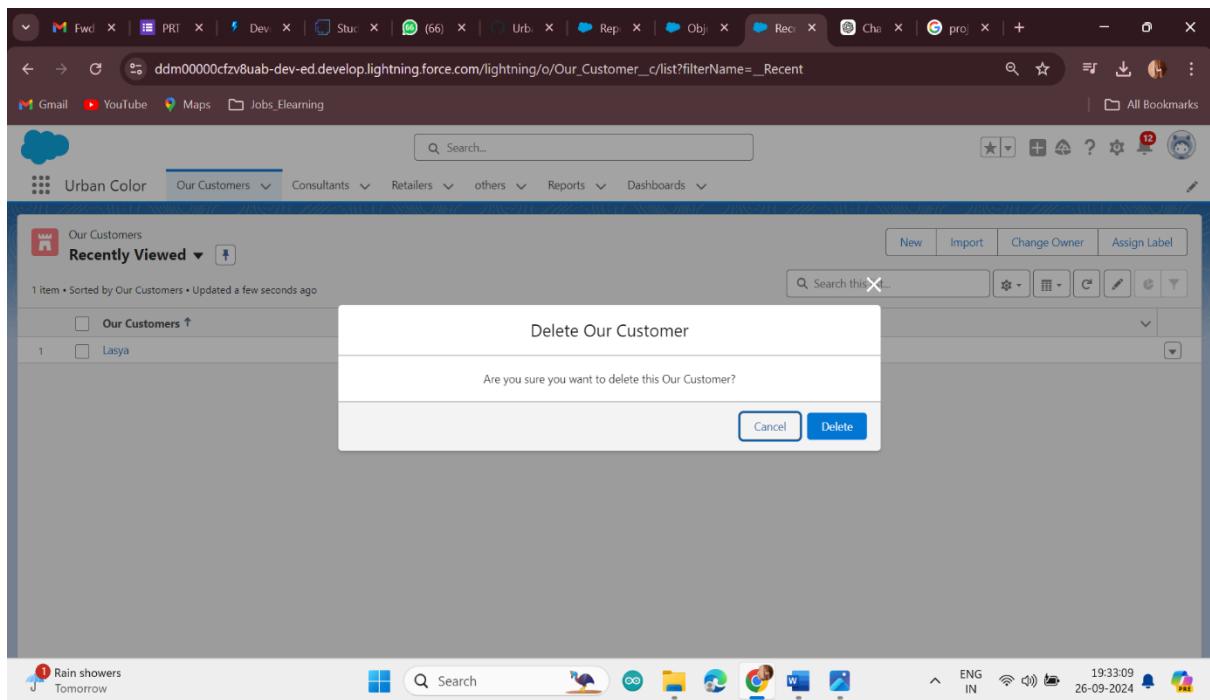
1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on any record name. you can see the details of the Our Customer.



### 9.3.Delete Record (Our Customer)

Delete Record (Our Customer):

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color & click on it.
3. Click on Our Customer Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again

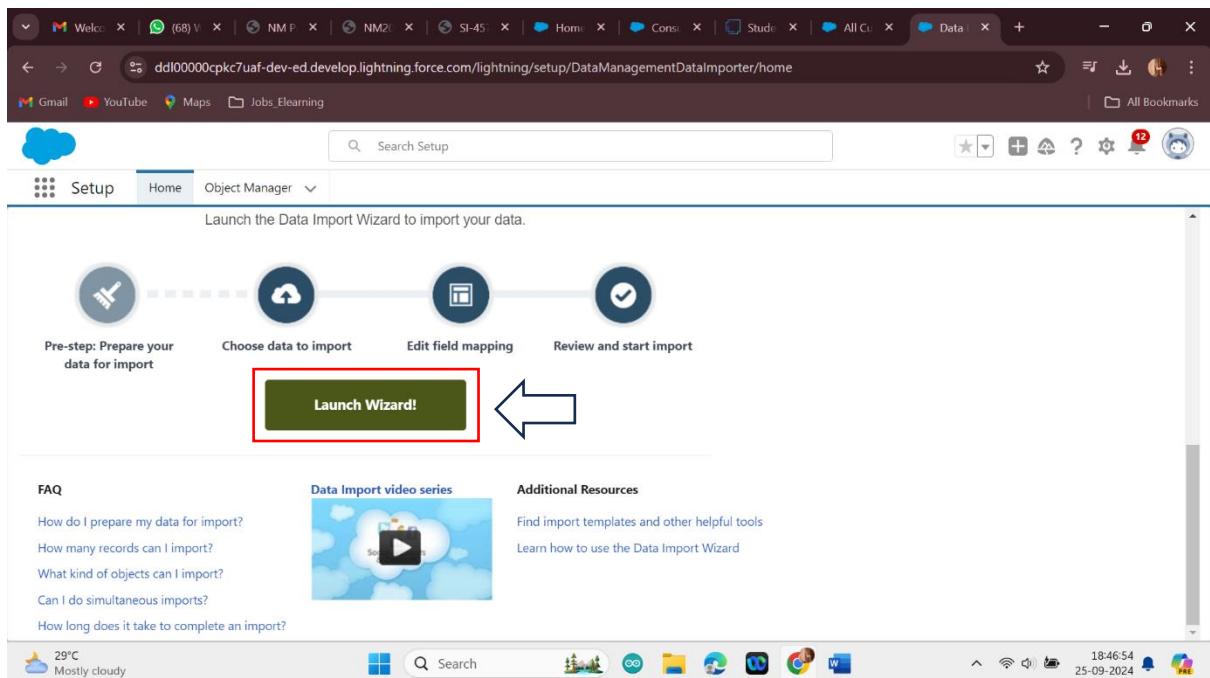


## 10.Import Data

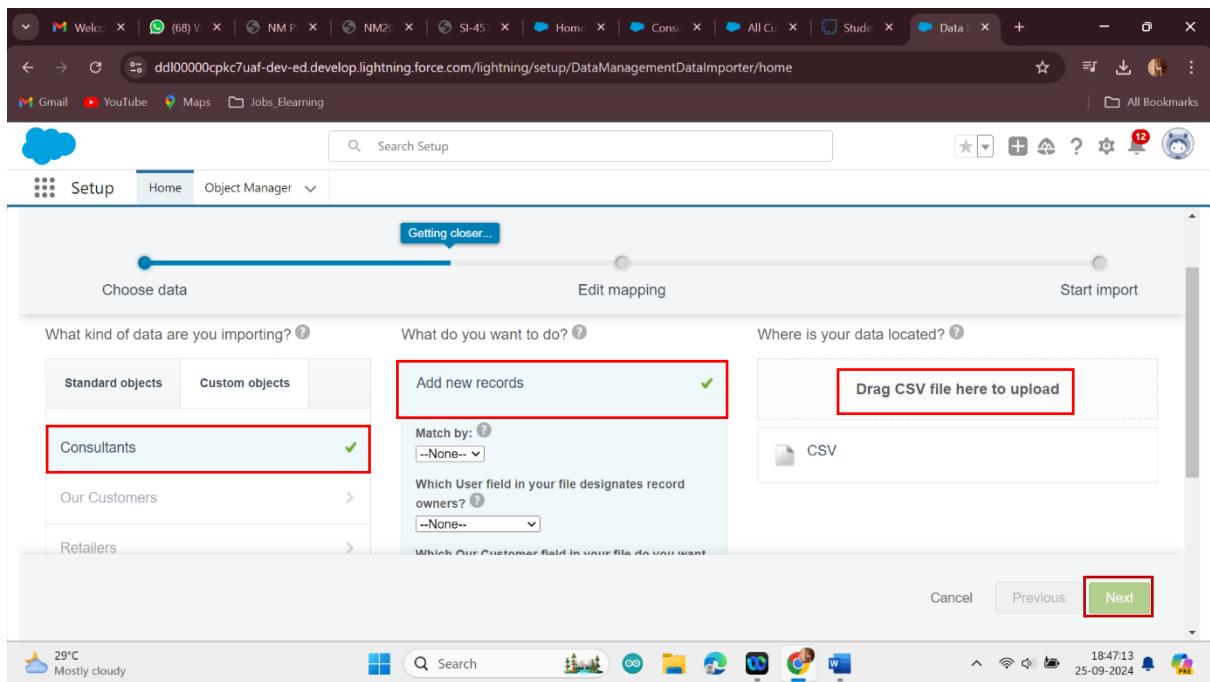
Data Import Wizard—this tool, accessible through the Setup menu, lets you import data in common standard objects, such as contacts, leads, accounts, as well as data in custom objects.

### 10.1.To Import Data

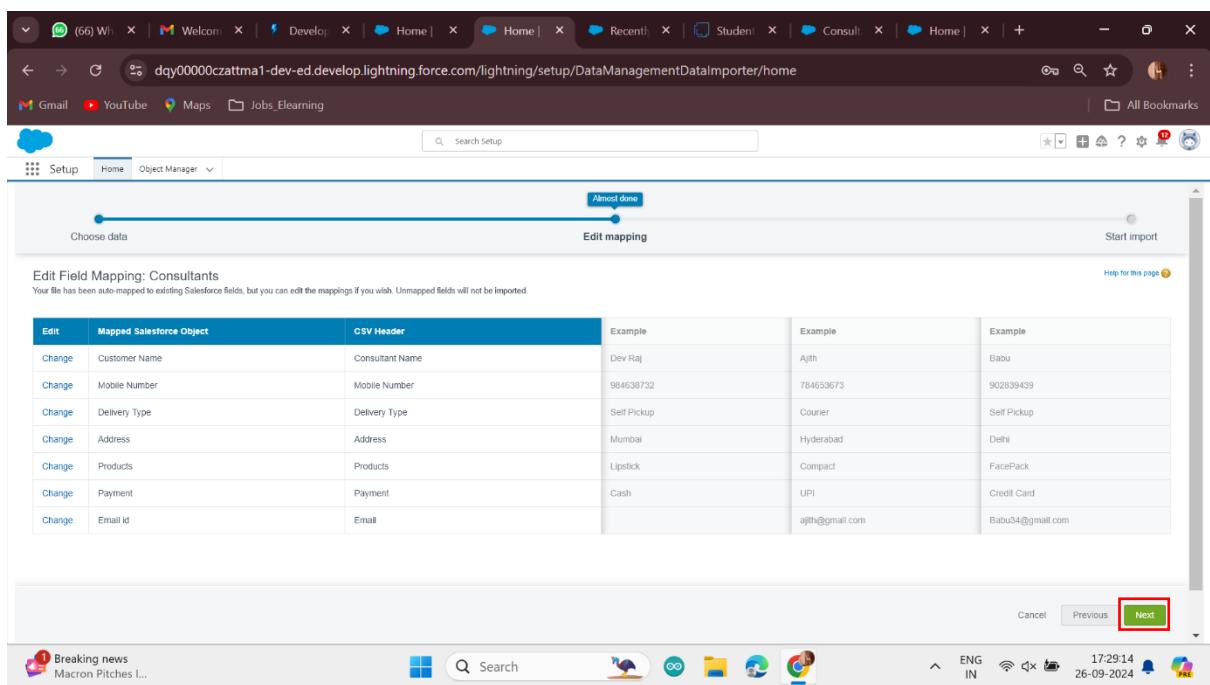
1. From Setup, click the Home tab.
2. In the Quick Find box, enter Data Import and select Data Import Wizard
3. Click Launch Wizard!



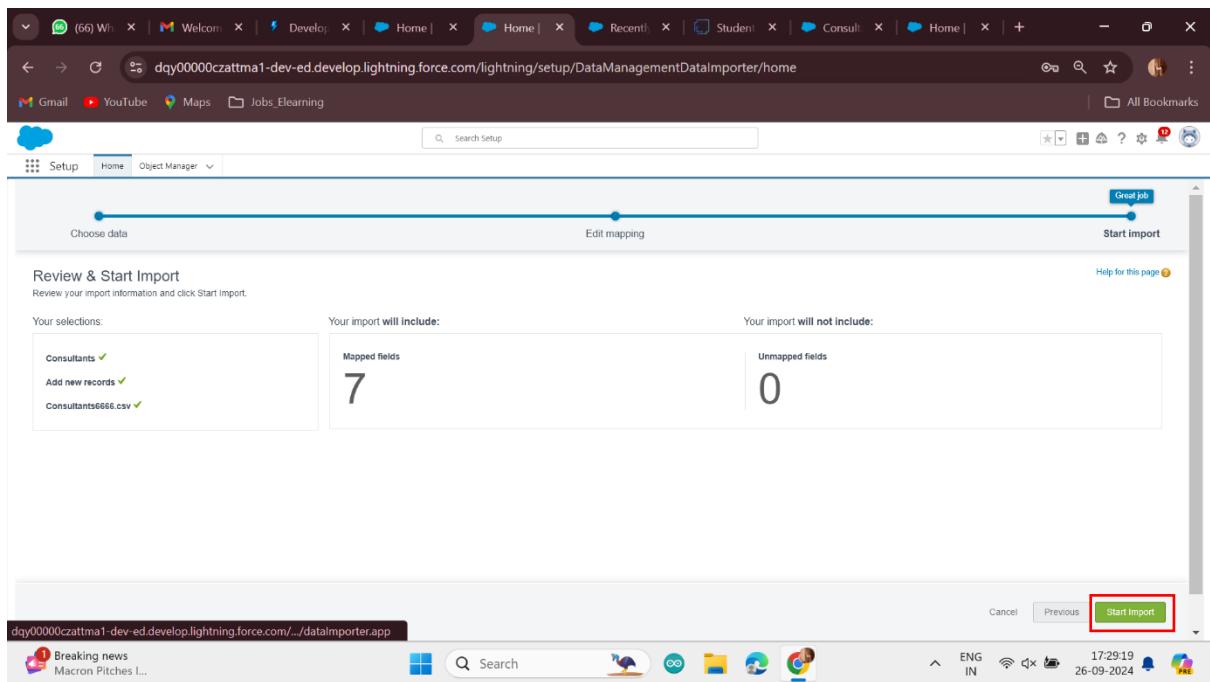
4. Click the Custom Objects tab and select the Consultant object.
5. Select Add new records.
6. Click CSV and choose file Consultant\_CSV which we made earlier. Click Next.



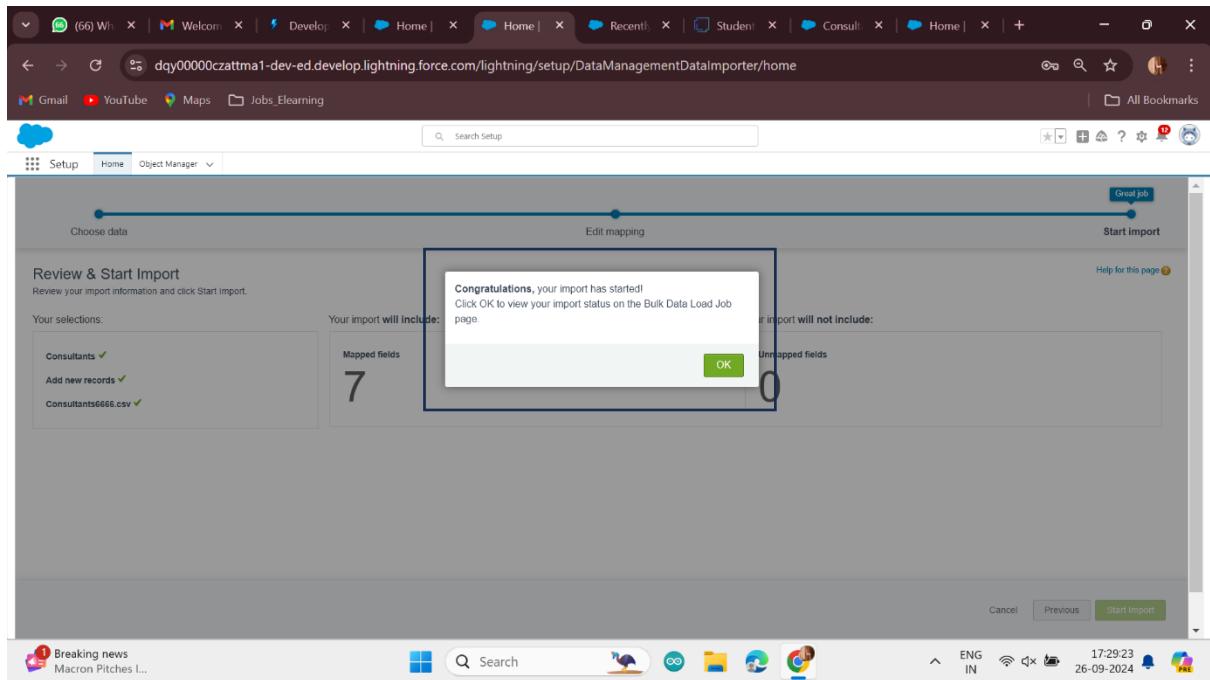
7. Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next



8. The next screen gives you a summary of your data import. Click Start Import.



## 9. Click OK on the popup



## 10. Scroll down the page and verify that your data has been imported under batches

Search Setup

Q impo

Setup Home Object Manager

Object Consultant

External ID Field Progress 100%

Content Type CSV Records Processed 9

Concurrency Mode Parallel Records Failed 0

API Version 61.0 Retries 0

Reload

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751Qy000006FyI9	26/09/2024, 5.29 pm	26/09/2024, 5.29 pm	103	41	0	9	0	0	Completed	

Didnt find what you're looking for?  
Try using Global Search.

Breaking news  
Macron Pitches...  
ENG IN 17:29:59 26-09-2024

Make sure you have 0 records under the records failed column.

**Note** - Do Field mapping carefully.

## 11.What are Reports?

### **Reports:**

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

#### 1. Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

#### 2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

#### 3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

#### 4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

### **Report types:**

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

- A report type cannot include more than 4 objects.
- Once a report is created its report type cannot be changed.

There are 2 types of report types:

#### 1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

**Note:** Standard report types always have inner joins.

2. Custom Report Types:  
Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage
3. Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.  
In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:  
With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.
2. Editor:  
With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.
3. Manager:  
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user’s access levels to this folder. Also, users with Manager Access levels can delete the report.

### **11.1.Create Report**

- 1.Click App Launcher
- 2.Select Urban Color App
- 3.Click reports tab
- 4.Click New Report.
- 5.Click the report type as Consultants Click Start report.
- 6.Customize your report, in Columns select – Consultant Name, Delivery type, Products, Payment.
- 7.Click on the drop down option on the payment column and select Bucket this column.
- 8.Bucket Name as Payment type
- 9.Click on Add Bucket and name it as NetBanking
- 10.Click on Add Bucket and name it as Cash
- 11.Now Click on All Values and select Credit Card, Debit Card, UPI and Move to Net Banking.
- 12.Now Click on All Values again and select Cash and Move to Cash.
- 13.Click on Apply.

REPORT ▾  
New Consultants Report ▾ Consultants

Fields ▾

**Groups**

- GROUP ROWS
- Add group...
- Payment type** (highlighted with a red box)

**Columns**

- Add column...
- Consultant: Consultants
- Customer Name
- Delivery Type
- Products
- Payment

Subtotal

Cash (2)	a01dM00000Y1Wf1	Dev Raj	Self Pickup	Lipstick	Cash
	a01dM00000Y1Wf8	Shankar	Self Pickup	FacePack	Cash

Total (9)

Row Counts Detail Rows Subtotals Grand Total

28°C Mostly cloudy Search ENG IN 18:43:40 26-09-2024

14.In Group Rows Add Payment Type Bucket Field.

15.Click refresh

16.Click Save and Run

17.Give report name – Consultant report

18.Click Save.

REPORT ▾  
**Consultants Report**

Total Records 9

Fields ▾

**Payment type** (highlighted with a red box)

**Consultant: Consultants**

**Customer Name**

**Delivery Type**

**Products**

**Payment**

Subtotal

Cash (2)	a01dM00000Y1Wf1	Dev Raj	Self Pickup	Lipstick	Cash
	a01dM00000Y1Wf8	Shankar	Self Pickup	FacePack	Cash

Total (9)

Row Counts Detail Rows Subtotals Grand Total

Tomorrow's low Near record Search ENG IN 18:45:24 26-09-2024

## 11.2.View Report

1. Click on App Launcher on the left side of the screen.
2. Search Urban Color App & click on it.
3. Click on Reports Tab.
4. Click on Urban Color Report and see records

The screenshot shows the Urban Color app interface within a web browser. The top navigation bar includes links for Customers, Consultants, Retailers, others, Reports, and Dashboards. The Reports tab is selected. On the left, a sidebar lists categories like Recent, REPORTS (Recent), FOLDERS (All Folders), and FAVORITES (All Favorites). The main content area displays a table of reports. A red box highlights the table header row, which includes columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report entry is visible: "Consultant report" under "Private Reports" created by "Tapasi Likitha Reddy" on "25/9/2024, 6:58 pm". At the bottom of the screen, there's a taskbar with various icons and system status indicators.

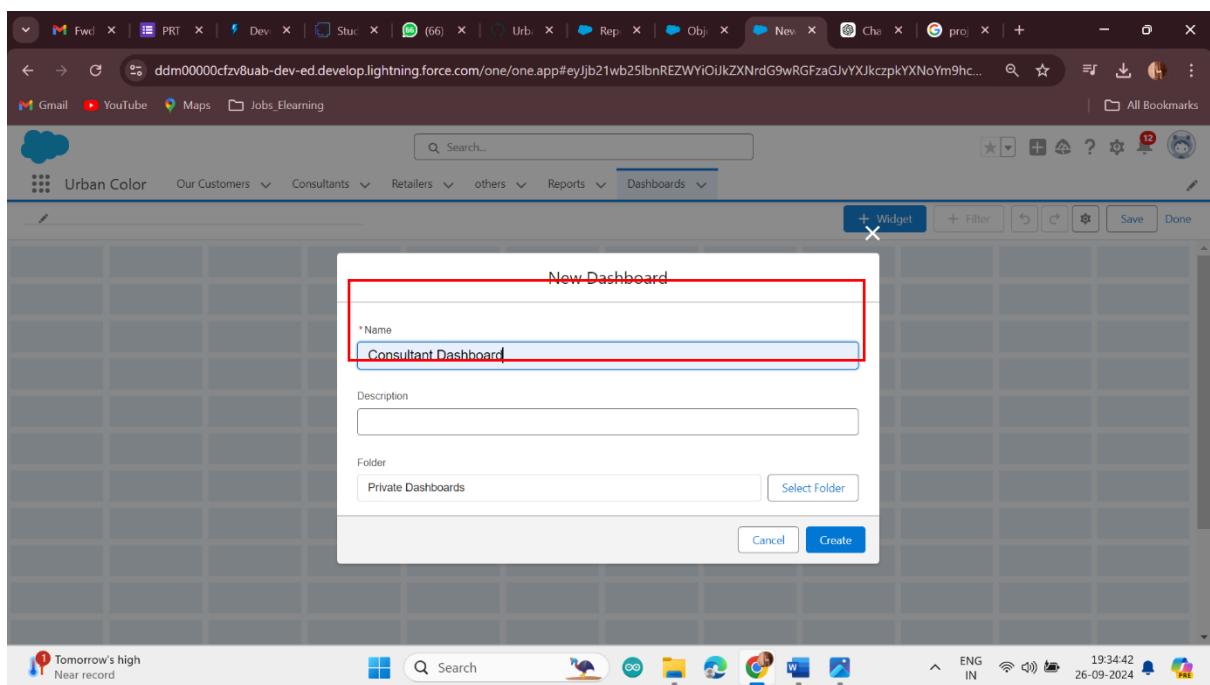
Report Name	Description	Folder	Created By	Created On	Subscribed
Consultant report	Private Reports	Tapasi Likitha Reddy	25/9/2024, 6:58 pm		

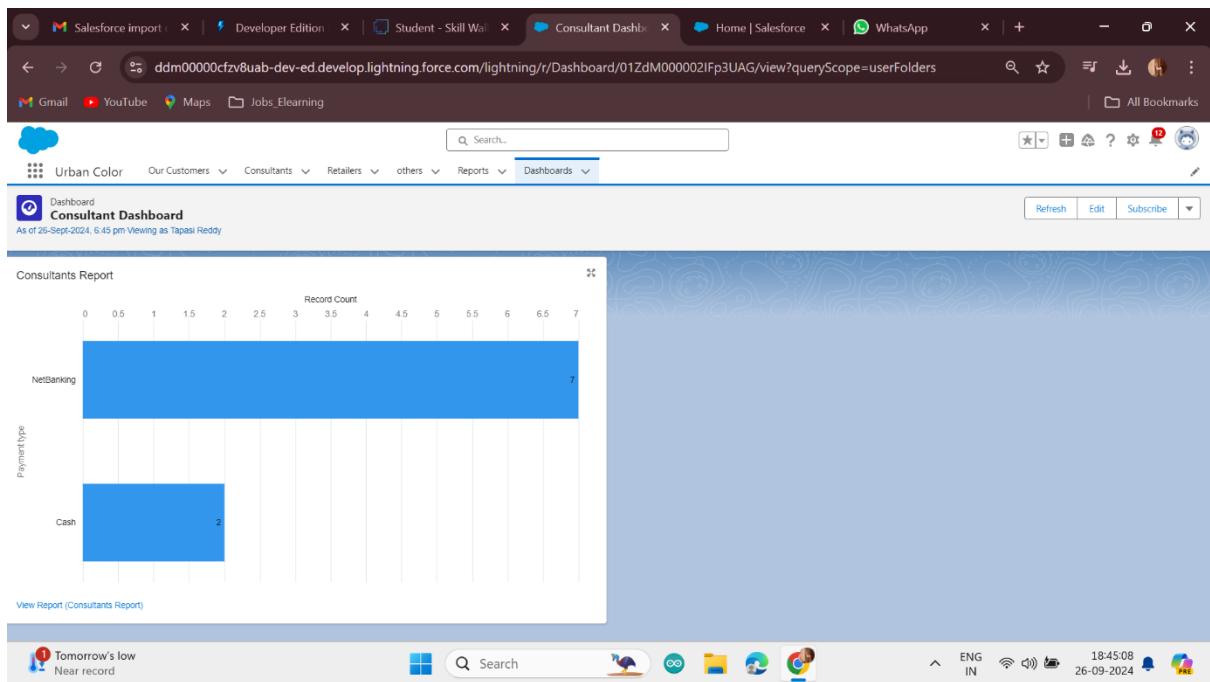
## 12.Dashboards

Dashboards let you curate data from reports using charts, tables, and metrics. If your colleagues need more information, then they're able to view your dashboard's data supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

### **12.1.Create Dashboard**

1. Click on the Dashboards tab from the Urban Color application.
2. Click on the new dashboard.
3. Give name- Consultant Dashboard
4. Click create
5. Give your dashboard a name and click on +component
6. Select the Consultants Report which you created.
7. For the data visualization select any of the chart, table etc. as per your choice/requirement.
8. Click add.
9. Click save.
10. Click save.





## 12.2. View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Candidate Internal Result Card & click on it.
3. Click on Dashboard Tab.
4. Click on Candidate Internal Result Card see graph view of records

